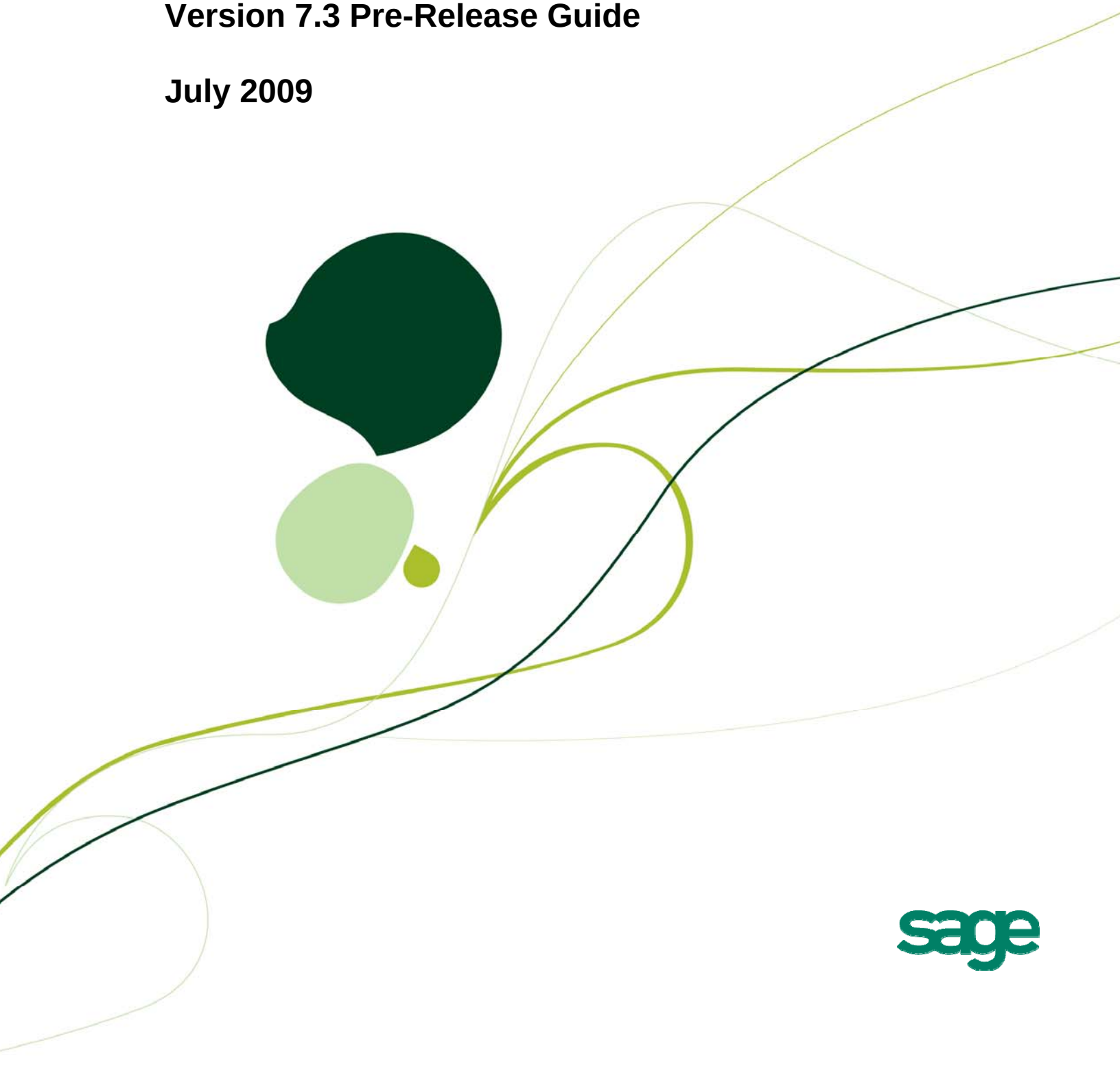
Sage MAS 500 ERP

Version 7.3 Pre-Release Guide

July 2009



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Overview

Sage MAS 500 has a rich history as an award winning ERP solution that delivers comprehensive business functionality which enables mid-market enterprises to improve efficiency and productivity while reducing operational costs. Powerful, yet simple real-time reporting and data analytics provide business intelligence needed to optimize business decisions and maintain a competitive edge during challenging economic conditions.

Version 7.3 extends that heritage by setting new standards for quality and reliability, by introducing numerous usability enhancements that improve productivity and ease of use, and by significantly improving performance and scalability to empower you to accomplish more with fewer resources. Extended platform updates deliver support for the latest operating systems, database platforms, and virtualization.

Both new and existing customers will immediately benefit from the new technologies, in addition to the usability, scalability, and performance improvements throughout the system. We encourage Sage MAS 500 customers and Business Partners to review this Pre-Release Guide to fully understand the value and opportunity that Sage MAS 500 version 7.3 delivers.

Availability

Version 7.3 is expected to begin shipping in November 2009 to all customers with an active Sage maintenance plan.

Functional Enhancements

New Module – Credit Card Processing

The new Sage MAS 500 Credit Card Processing module enables customers to quickly and easily process payment receipts. New features deliver advanced security and ease of use to support your payment processing needs.

- Allows multiple Credit Card accounts per Customer
- Supports multiple Credit Card types and Processor types:
  - Sage Payment Solutions
  - PayFlow Pro by PayPal
  - Other (custom snap-in interface)
- Supports Address Verification and Card Security Code
- Credit Card transactions can be initiated and managed from within
  - Sales Order
  - Accounts Receivable
  - Cash Management

Pricing:

- No charge if using Sage Payment Solutions as the processor
- No charge if already licensed for Sage MAS 500 PSG Credit Card Processing

- Please contact your Sage MAS 500 Business Partner for all other pricing questions, including pricing to activate a processor other than Sage Payment Solutions.

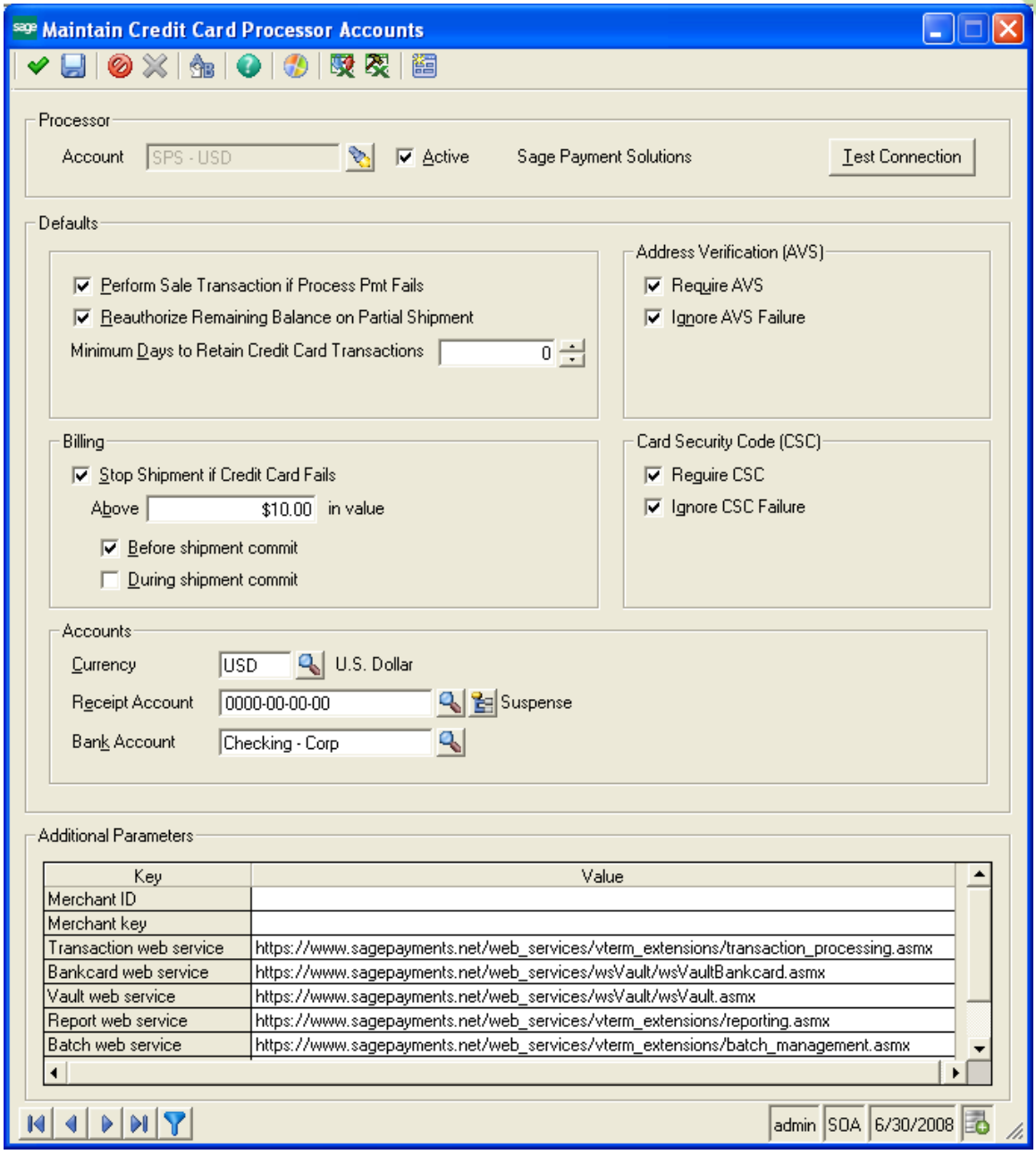
7.3 Credit Card Features:

Operational Area	Credit Card Processing Features
Sales	• Down payments • Multiple authorizations per order • Multiple credit cards per order • Level I & II transactions
Shipping	• Capture funds during shipping • Reauthorize partial shipments • Flexible error handling (stop shipment, invoice balance)
Accounts Receivable	• Cash receipts • Invoice payments • Refunds
Customer Care	• Store card information for next visit • See all transactions performed for a customer
Security	• PCI compliance ▪ Encrypted card storage • Secured communication • Support for the Sage Vault • Address verification • Card security code • Length, first digit, MOD10 validation

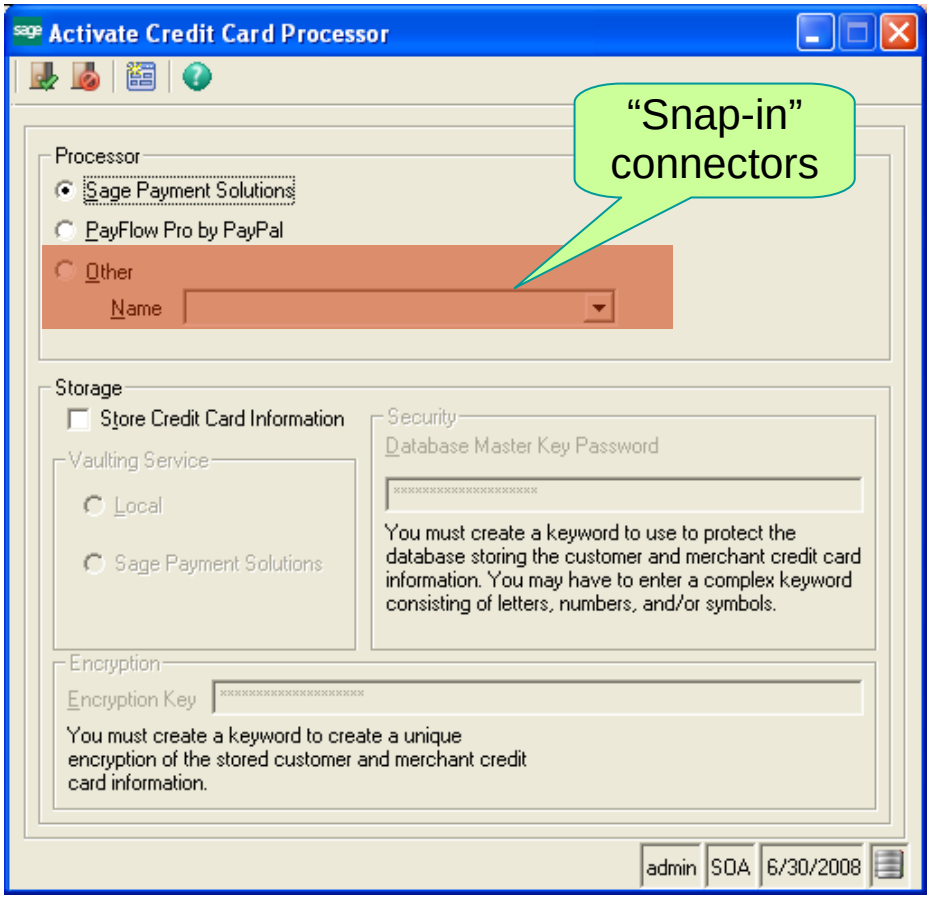
Note to Current Sage PSG Credit Card Customers:
The new 7.3 Credit Card module has greatly enhanced functionality compared to the Sage PSG module, and delivers a more complete and secure credit card processing solution. There are some differences that current PSG credit card customers should be aware of:

- Some reconfiguration will be required such as re-entering customer credit card information in v7.3.
- Processors supported out of the box in v7.3 are Sage Payment Solutions and PayFlow Pro by PayPal. In contrast, the PSG version supported PCCharge and Sage Payment Solutions. So, a customer using PCCharge as their processor would either need to change processors, or create a custom interface in v7.3 for PCCharge.

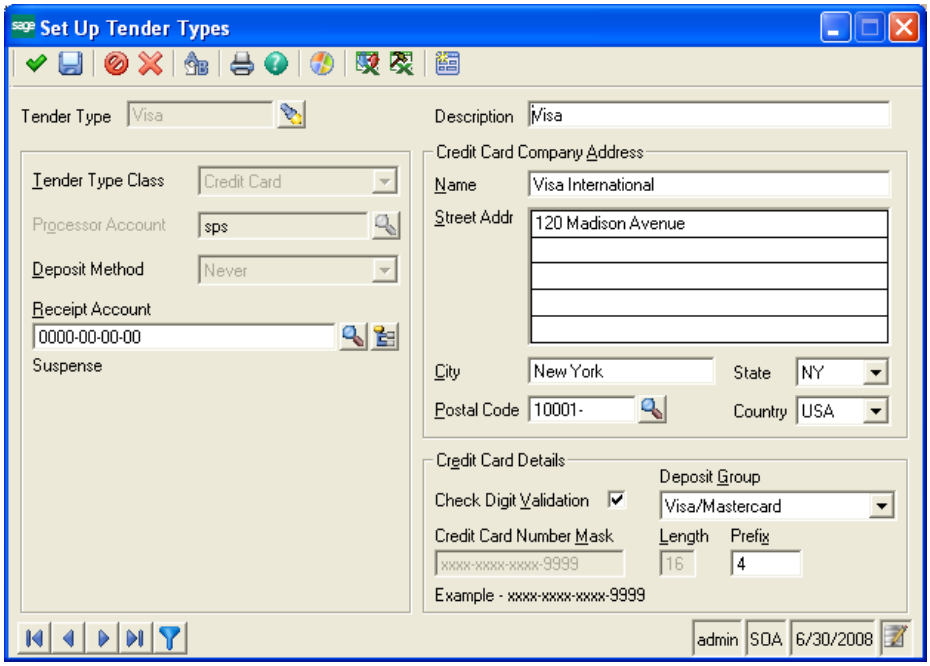
Screen Shots:



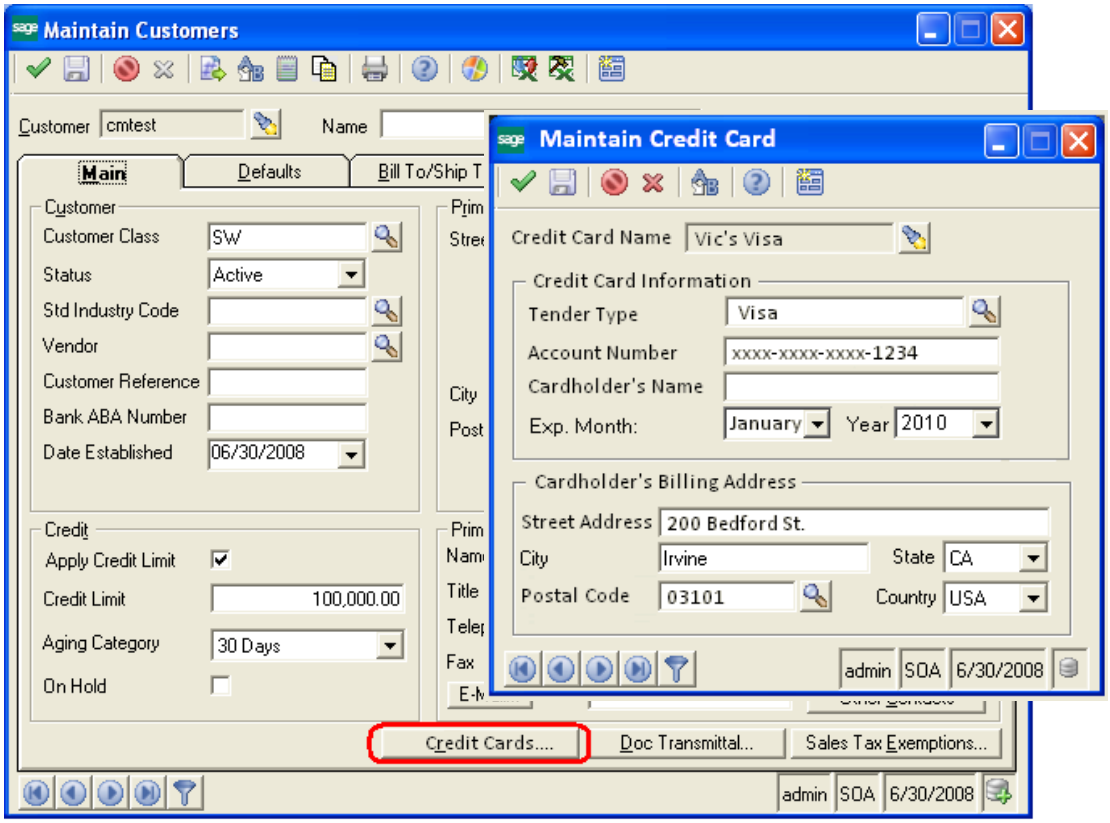
The Maintain Card Processor Accounts screen enables you to create and maintain credit card processors such as Sage Payment Solutions, and configure processing options for that processor.



The Activate Credit Card Processor screen allows you to select the processor to use for credit card payments, and enter security information.



Tender Types are created to define a specific credit card type, the corresponding processor, and GL account to use when posting receipts.



From the Maintain Customers screen, users can easily view and maintain credit card account information for that customer.

Sage Payment Solutions (SPS) Overview

- Provides credit card authorization, capture and settlement via SPS Gateway
- Strict Adherence to PCI (Payment Card Industry) data standards which provides secure and rapid payment authorization
- 24/7 online tools for account management, inquiry, and historical reporting
- Easy conversion from alternative providers
- SPS supported at no charge with Sage MAS 500 Credit Card Processing

Business Insights Enhancements

Pending Inventory Transactions Views

The following Business Insights Explorer (BIE) views are now available for you to view pending inventory transactions (see screen shots in the Inventory Management Enhancements section below):

- Pending Increase Transactions
- Pending Decrease Transactions
- Pending Physical Counts
- Posted Physical Counts

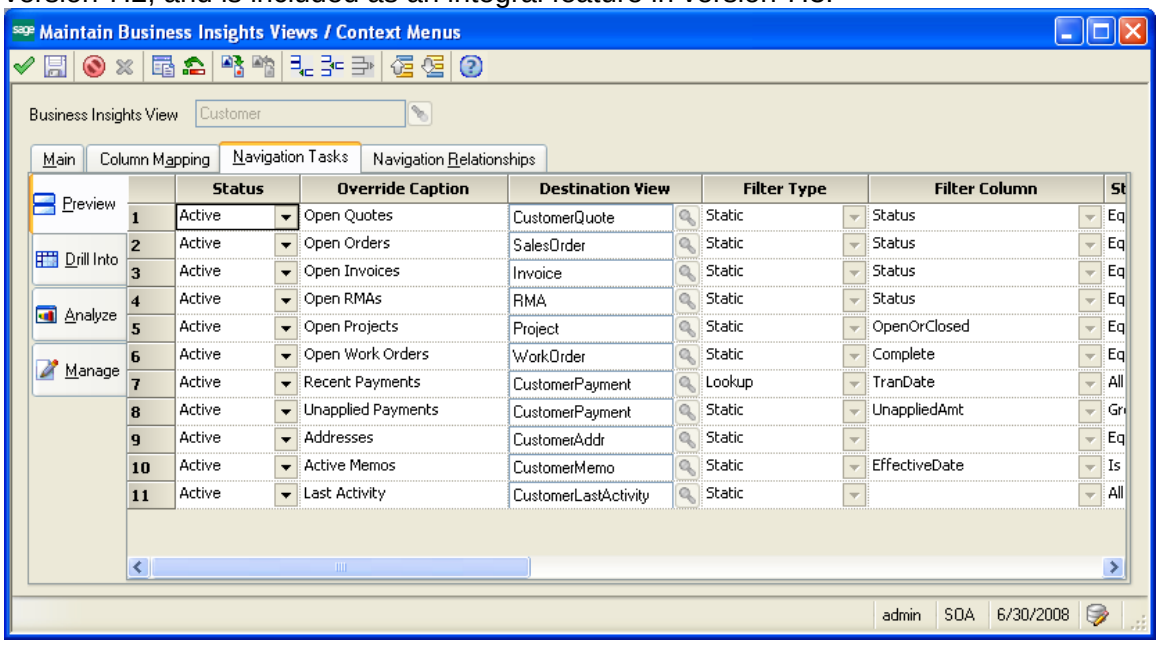
- Pending Lots (Preview)
- Pending Serial Numbers (Preview)

Context Menu Utility

The Context Menu Utility provides customers and partners the ability to customize the out-of-the-box Business Insights Explorer context menus (i.e., right-click menus) and views, in addition to creating new BIE views. With it, you can:

- customize BIE views
- add new BIE views
- add and hide preview, drill-into and manage options
- create bridge views
- export and import any BIE customizations from a test system into a live production system

The Context Menu Utility was first introduced in the June 2008 monthly update (MU) for version 7.2, and is included as an integral feature in version 7.3.



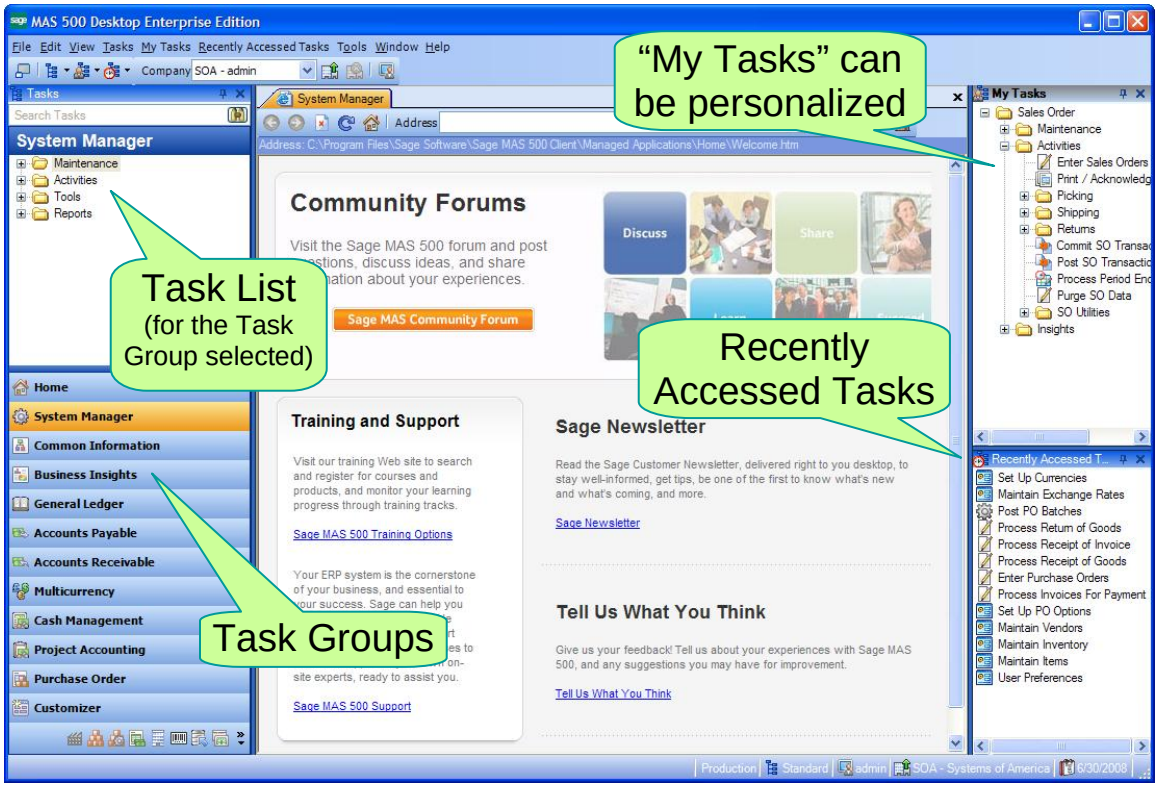
Global Enhancements

Updated Sage MAS 500 Desktop

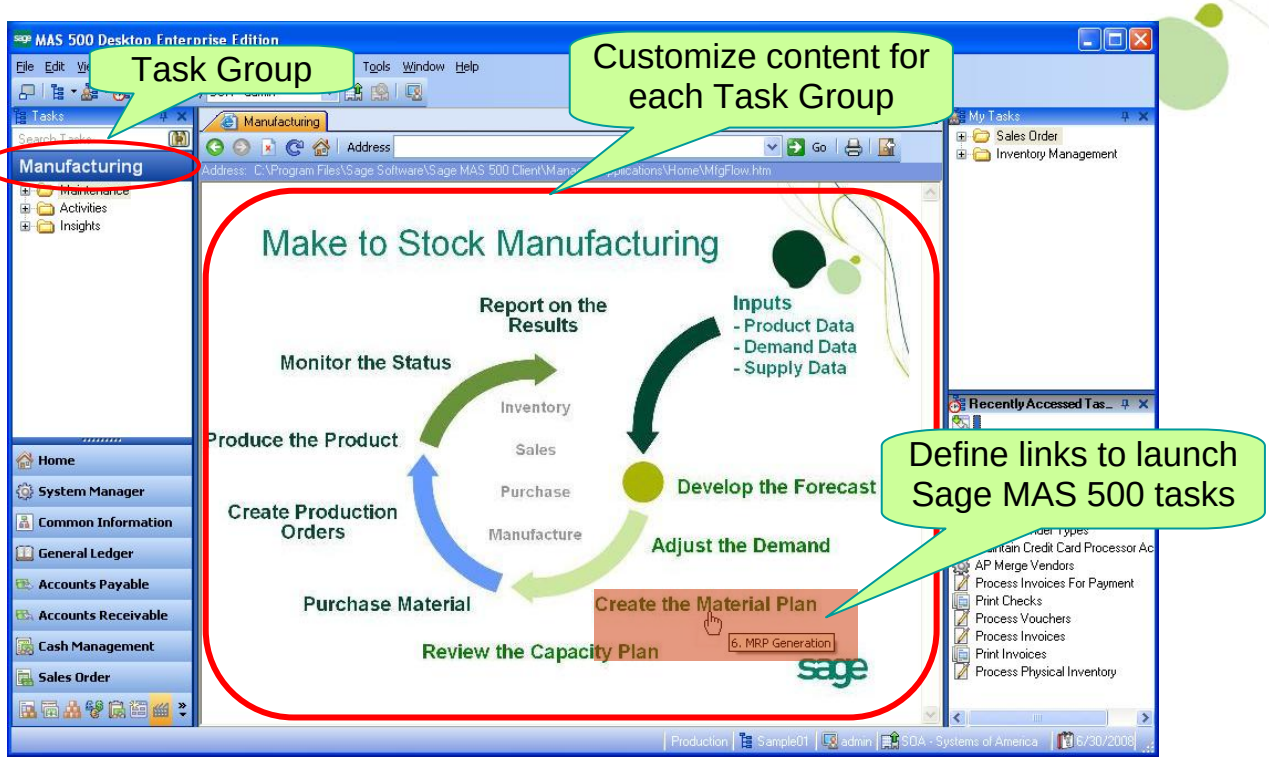
The Sage MAS 500 Desktop has been updated with improved controls for task access and navigation, with a familiar Outlook look and feel.

- The Tasks Explorer Bar has been updated to simplify the navigation by allowing you to display the menus for one module at a time. You can also choose from various Explorer styles on the View menu to change the behavior of the Explorer Bar buttons and how the menus are displayed.

- You can personalize the Tasks Explorer Bar using the Navigation Pane Options. Change the order of the module menu groups, and hide or show groups on the menu. This also delivers improved role-centric adaptability.
- The My Tasks Explorer Bar now appears on the right-side of the Desktop by default to provide improved access to the menu as well as simplify dragging tasks to the menu. The Tasks and My Tasks Explorer Bars can still be displayed as tabs (as in previous versions) by unlocking the Desktop and dragging one Explorer Bar on top of the other.
- When you drag an Explorer Bar, docking indicators are now provided to indicate (by highlighting the location) where the Explorer Bar can be placed on the Desktop.
- A new Recently Accessed Tasks window displays a list of the most recent tasks used. This window can be configured to control the number of entries displayed.



Additionally, new levels of flexibility and customization are delivered with the ability to define custom content to display for each Task Group by pointing to a simple web page. You have complete flexibility to define the content according to your business needs, such as a workflow diagram, links to various documents or external sites, or a statement of company policies and procedures.



In this example, the "Manufacturing" Task Group has been customized to display a simple web page containing a Make to Stock Manufacturing workflow diagram. Each step shown in the diagram was created with links to launch the corresponding Sage MAS 500 task. For example, clicking on "Create the Material Plan" will conveniently launch the Sage MAS 500 MRP Generation task.

Extended Platform Support

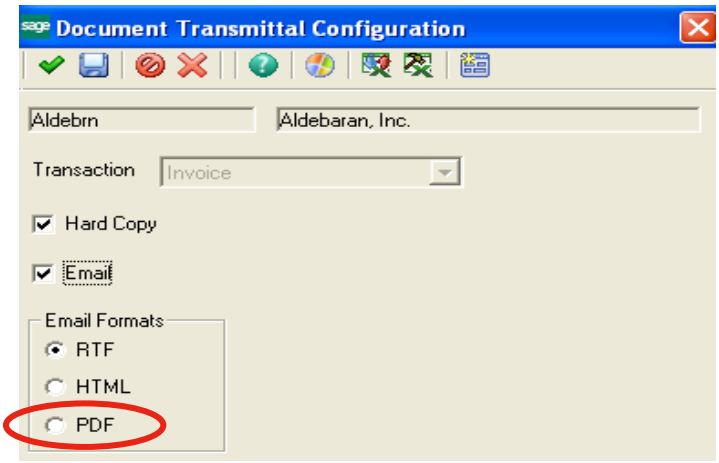
Version 7.3 includes support for some of the latest technology platforms. You can now use Sage MAS 500 on Microsoft SQL Server 2008 and Windows Server 2008. Support has also been added for 64-bit versions of client and server operating systems and virtualization platforms. Complete details will be published in late October in the Sage MAS 500 v7.3 Compatibility and Resource Guide.

Data Migrator

When Sage MAS 90 and 200 customers are ready to upgrade to Sage MAS 500, Data Migrator migrates data from Sage MAS 90 and 200 to Sage MAS 500. Data Migrator now supports migrations from Sage MAS 90 and 200 version 4.10.

PDF Document Transmittal for Vendors & Customers

Vendor and Customer documents can now be generated and e-mailed in PDF format (in addition to RTF and HTML). This improves security since PDFs typically cannot be edited, and improves efficiency since it eliminates the need to create PDFs separately.



Application and Database Auditing

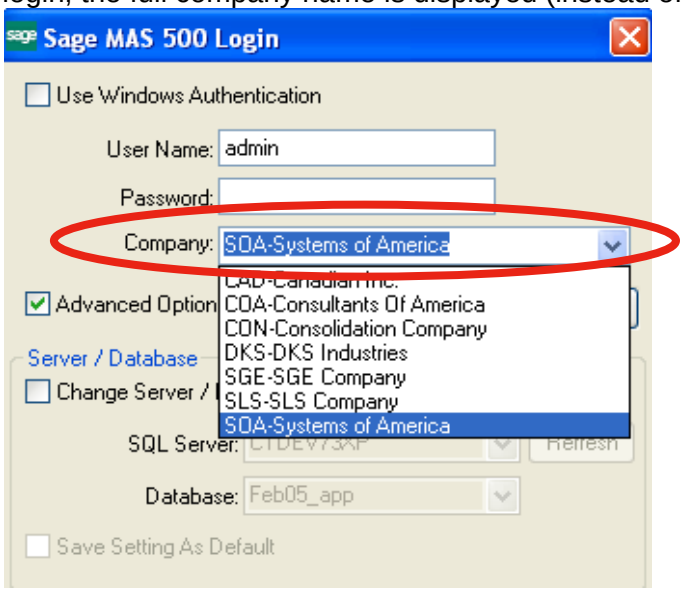
Application and database auditing was enhanced with the addition of two optional triggers that are used to keep track of data modifications.

- Database Auditing Trigger – tracks changes made by non-Sage MAS 500 applications to the database tables.
- Application Auditing Trigger – tracks user changes (deletions, additions, and modifications) made through the Sage MAS 500 Tasks.

Additionally, auditing can be turned off to maximize system performance. When auditing is disabled, the auditing triggers are not loaded or compiled, saving valuable SQL Server resources.

Full Company Name Displayed During Login

During login, the full company name is displayed (instead of the company abbreviation).

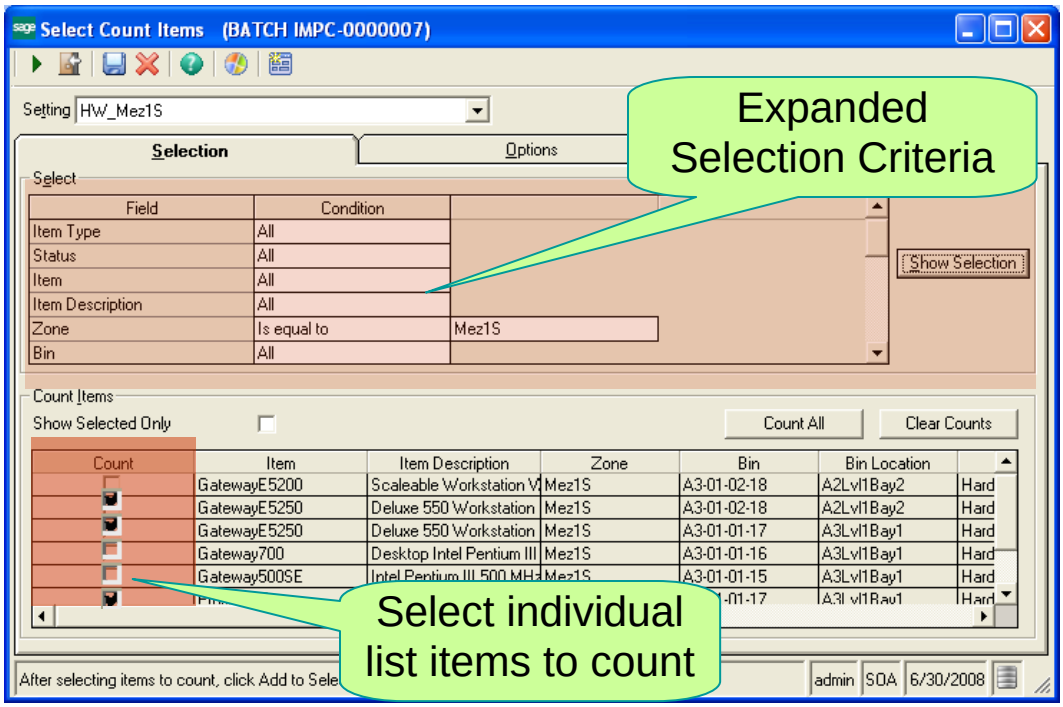


Inventory Management Enhancements

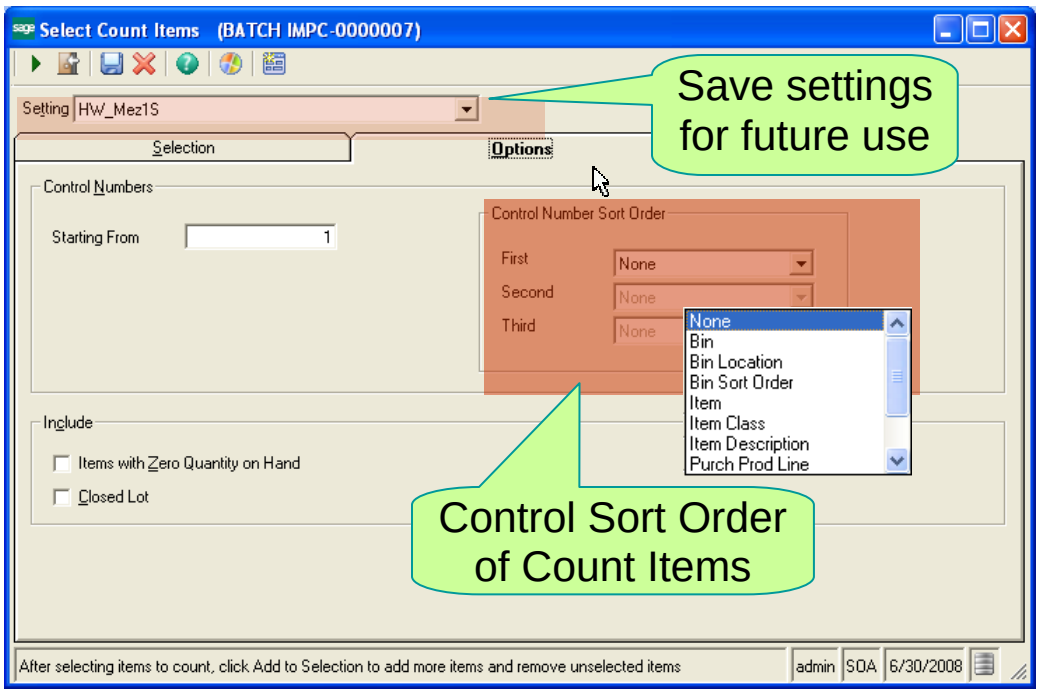
Physical Count

The Inventory Physical Count process has been enhanced with significant workflow and user interface improvements to make the count process fast, efficient, and accurate.

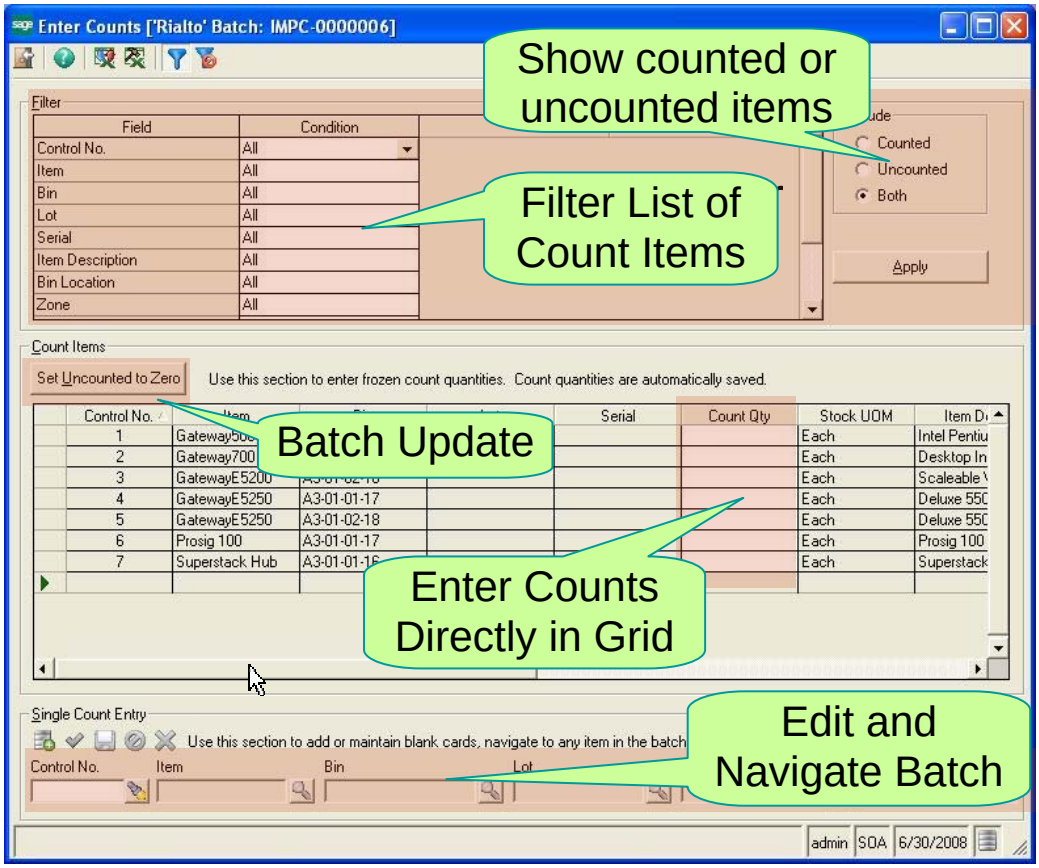
- Enter counts using new grid entry (using stock unit of measure).
- Expanded item selection criteria and sort order control. You can also select individual list items to count, and save count selection settings for future use.
- Warning messages are also displayed for items with missing counts.
- In the Enter Counts task, you can now filter a list of count items, include counted or uncounted items (or both), enter counts directly into a grid, and edit batch information.
- Option to set remaining uncounted items to zero
- Ability to delete frozen controls from a batch
- New detailed transaction report, and history table for audits
- Users who might prefer to enter counts in Excel instead of the new grid entry can select items to be counted in Sage MAS 500, export to Excel and fill in the count quantity, and use DataPorter to import the counts back into Sage MAS 500



On the Select Count Items screen, the Selection tab provides flexible selection criteria to easily determine which items to count. From the selection results, checkboxes in the lower panel enable you to select individual items to count.



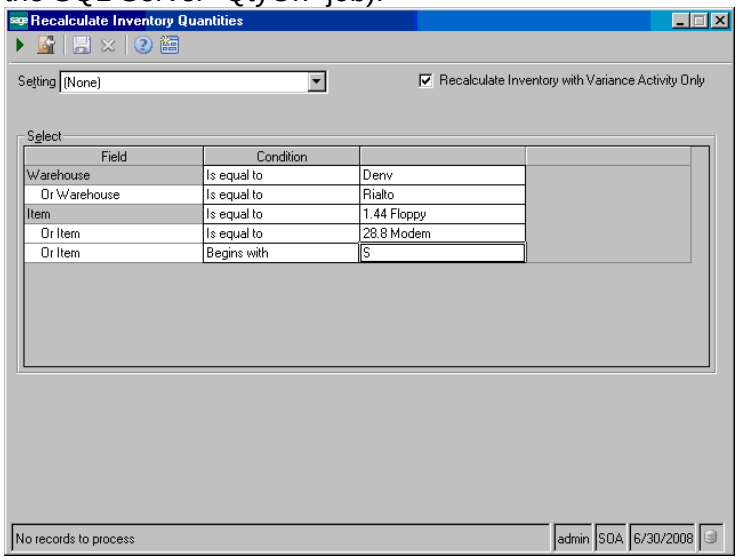
The Options tab enables the user to set the control number sort order.



The Enter Counts screen contains an easy-to-use grid entry. Powerful filter criteria empower you to target count items to display, and allow you to select uncounted items, counted items, or both. Save time by automatically setting uncounted items to zero.

Recalculate Inventory Quantities

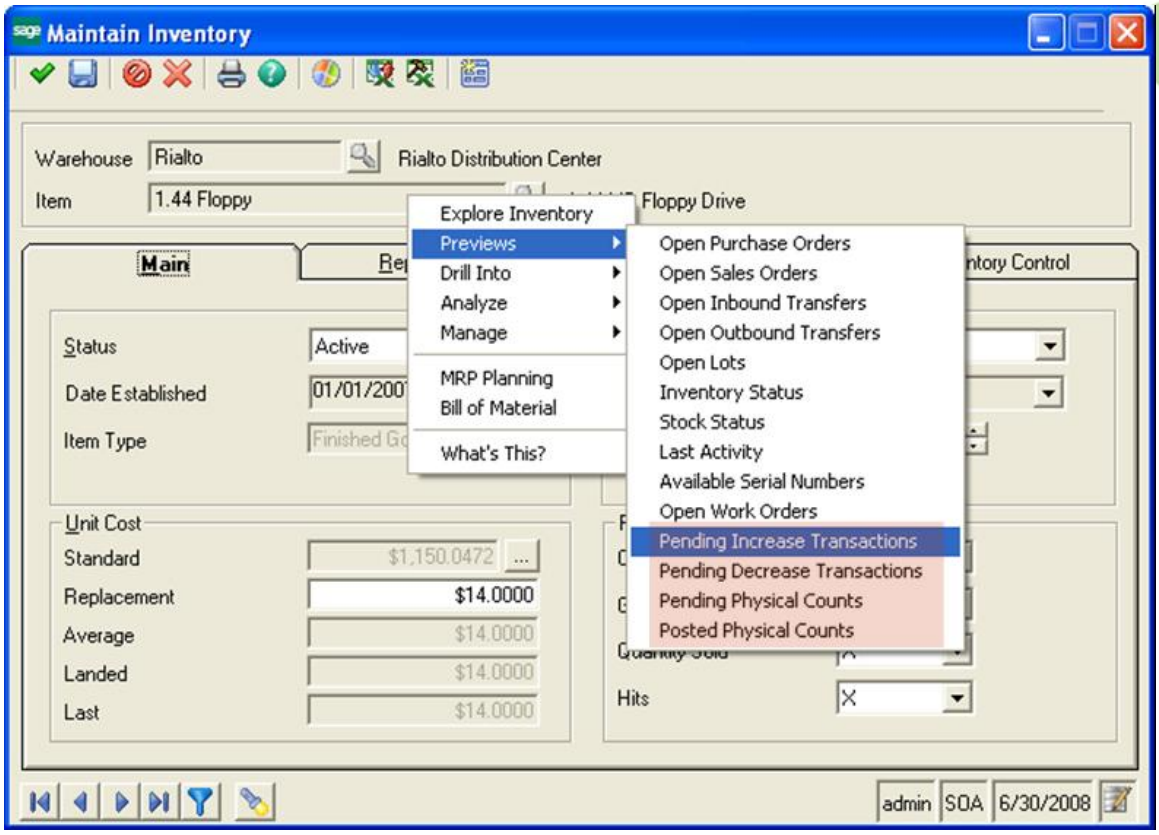
The new Recalculate Inventory Quantities utility can now be run on demand (executes the SQL Server “QtyOn” job).



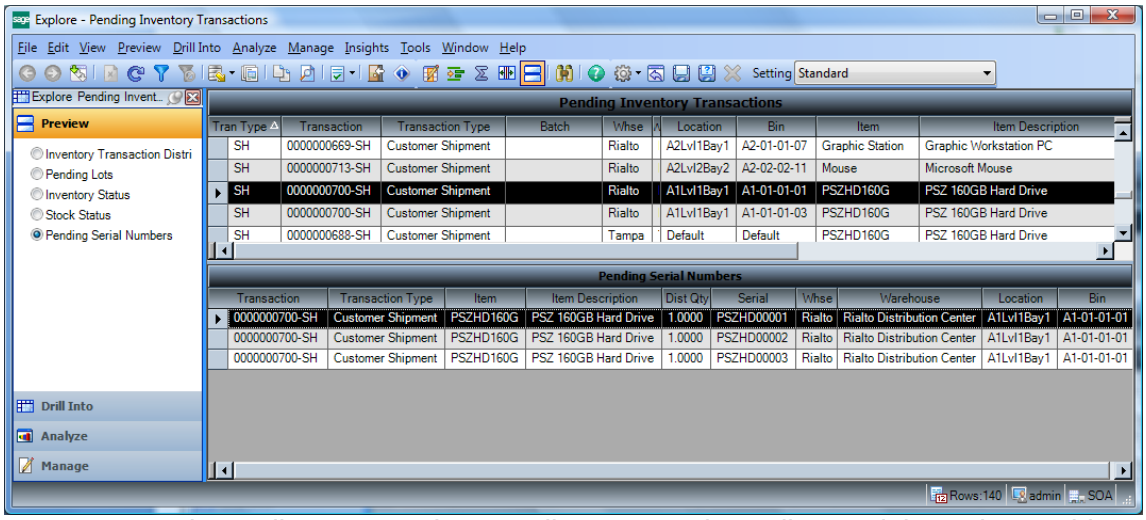
Business Insights Explorer Views

The information you need is available at your fingertips. Several new Business Insights Explorer (BIE) views are now available for you to view pending and posted inventory transactions:

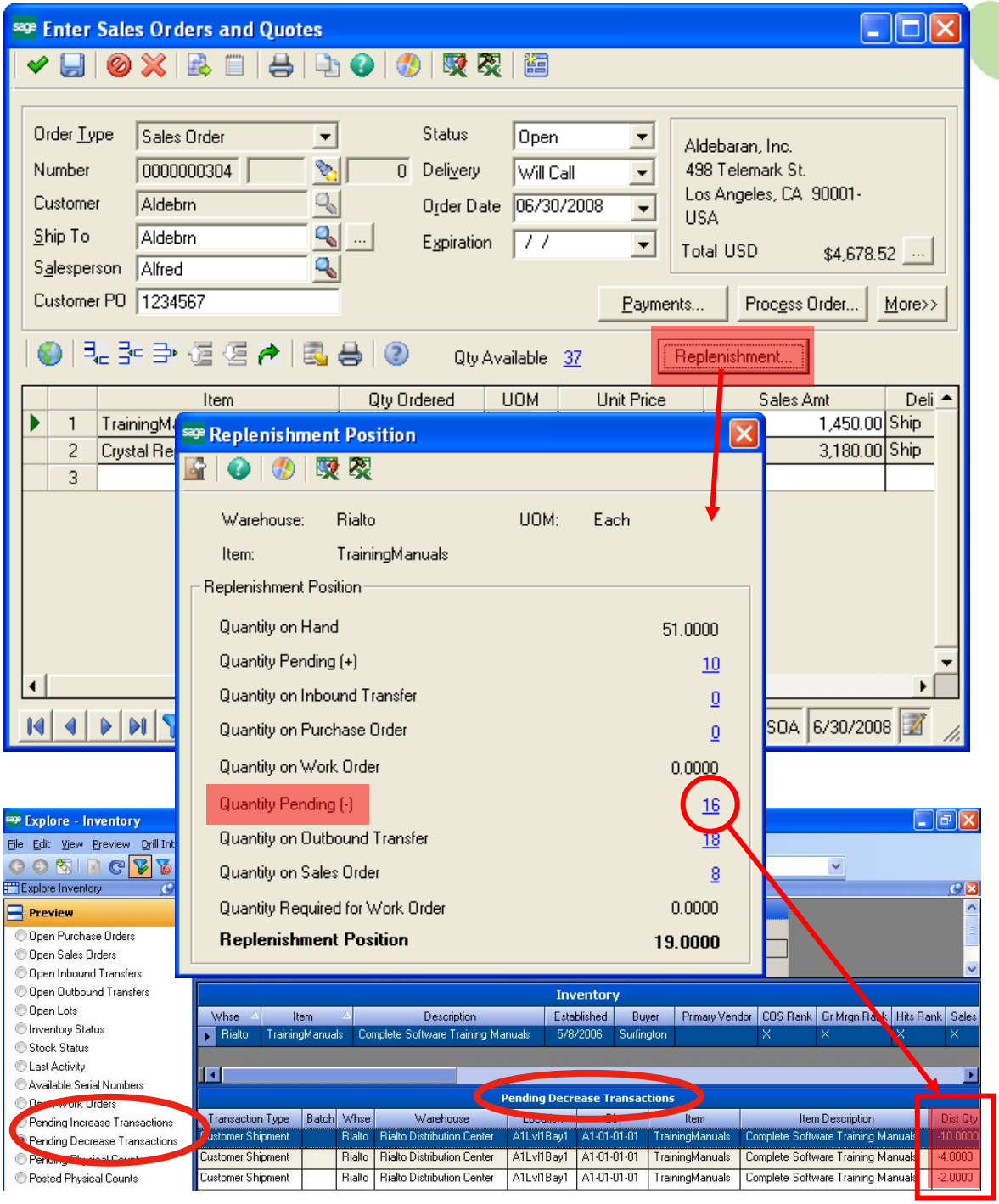
- Pending Increase Transactions
- Pending Decrease Transactions
- Pending Physical Counts
- Posted Physical Counts
- Pending Lots (Preview)
- Pending Serial Numbers (Preview)



New Inventory Previews can be selected to show details on pending inventory transactions.



New BIE Previews allow you to view pending Lots and Pending Serial Numbers. This example shows a pending shipment with three serialized items.



From the Sales Order entry screen, drill into pending inventory transactions down to line item detail.

Sales Order Enhancements

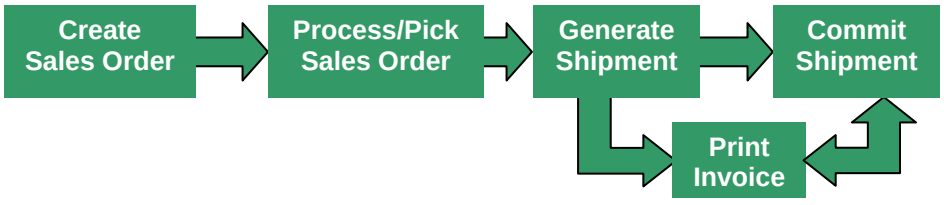
Shipment Commit Workflow

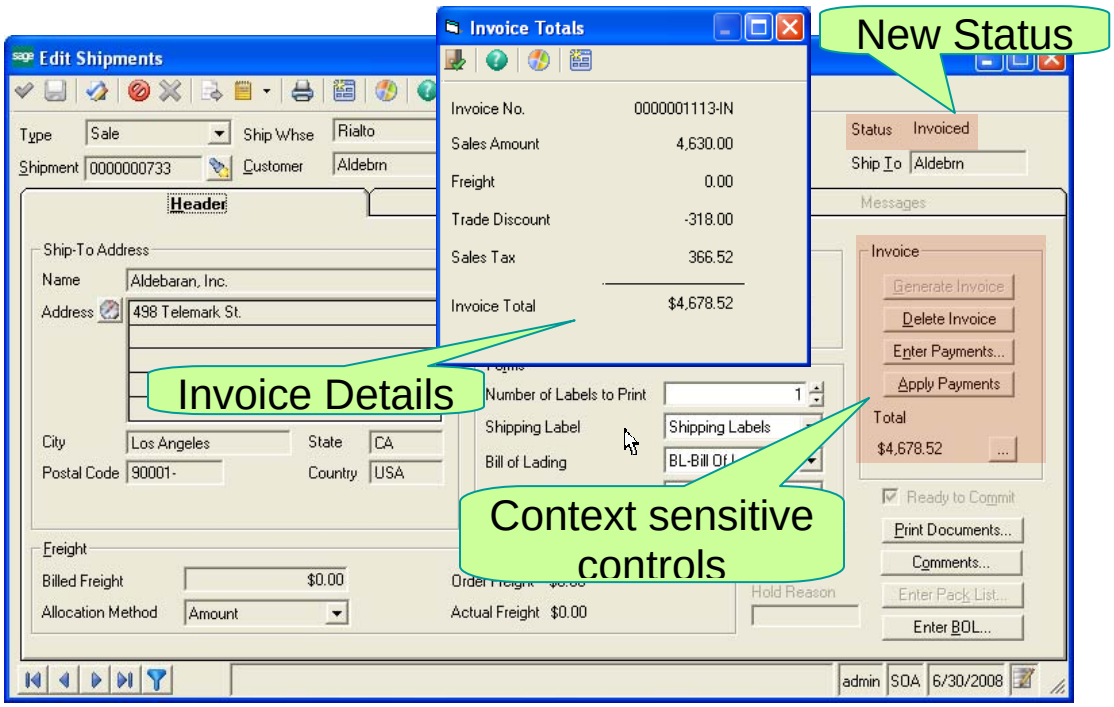
Previously, shipments had to be committed before an invoice could be printed. The shipment commit process has been enhanced to enable printing a pro-forma invoice before committing the shipment. Thus, a printed invoice can be included in a shipment, or quickly printed for counter sales and handed to a customer.

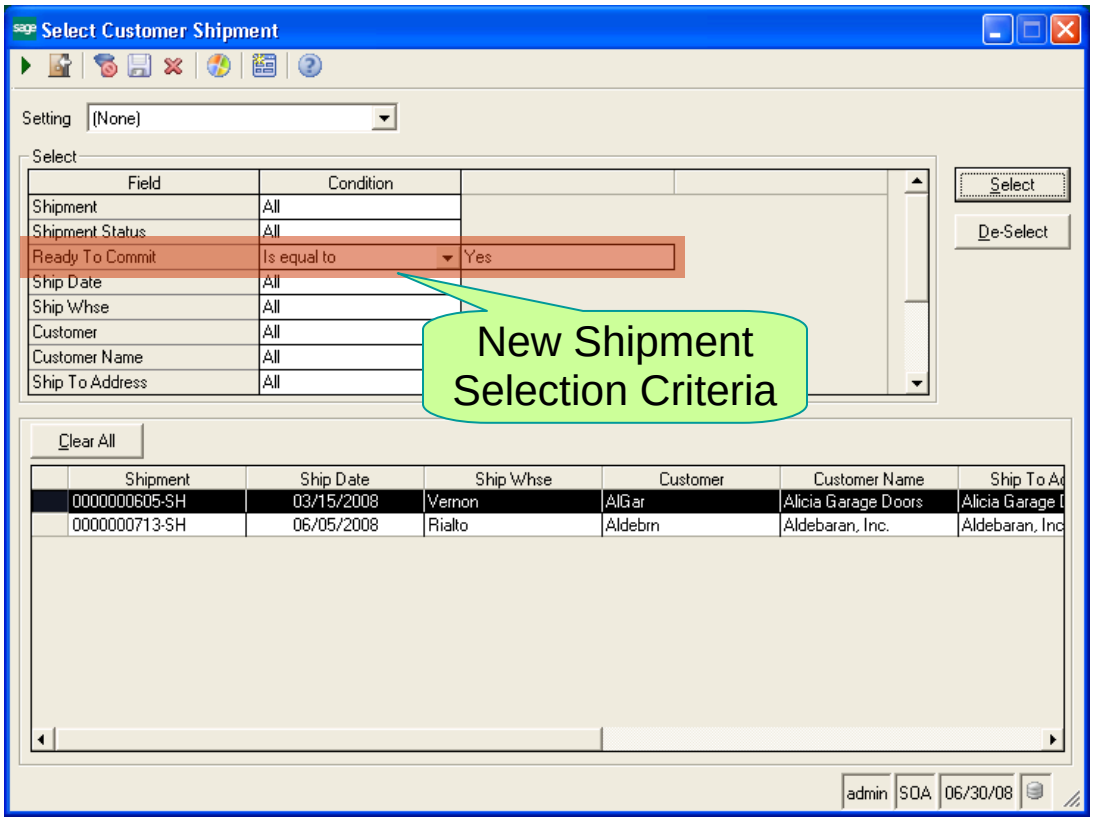
- The Edit Shipments task is enhanced with a new Invoiced status and the ability to generate, print, and view invoice details for a selected shipment.
- Quickly generate and print a pro-forma invoice prior to committing the shipment.
- Delete pending invoices before committing shipments.
- New security events control the ability to generate and delete pro-forma invoices prior to commit.
- Enter and apply payments in the Process Sales Order and Edit Shipments tasks.
- New “Ready To Commit” and “Shipment Status” selection criteria have been added to Select Customer Shipment task, allowing the commit processing to be postponed until after-hours if desired.
- Significant performance improvements in the Sales Order Commit and Edit Shipment tasks.
- New setting to optionally bypass commit validations when editing and saving shipments, thereby optimizing performance before the final commit.

Old Process:

New Process:







When selecting shipments to commit in batch, search criteria allows you to easily find shipments that are flagged as "Ready to Commit".

Cascade Sales Order Line Updates

In Sales Order Entry, updates made in the order header controls will optionally cascade down to all open sales order line items. Changes to the following details are supported:

- Ship To (FOB, Ship Via, Sales Tax)
- Ship Via (from line defaults)
- Delivery Method (FOB, Ship Via, Freight Amount, Preferred Vendor, Sales Tax)

In order to use this feature, the order lines must be in an open status and in the case of the delivery method controls, the order lines must be open with no activity.

Credit Card Entry

Credit card payment information can be entered in the following Sales Order tasks:

- Enter Sales Order and Quotes
- Edit Shipments
- Process Sales Orders

Accounts Payable Enhancements

Automated Clearing House (ACH)

The ACH feature allows you to use electronic funds transfer (EFT) as an alternative to checks as a payment method. The ACH feature supports both the United States (NACHA) and Canadian (AFT) formats.

Positive Pay

Positive Pay provides a useful tool in preventing check fraud by generating a file that is submitted to your financial institution to verify check information prior to payment. If check data matches the vendor's information, the bank will process the check.

Vendor Merge

You can now quickly and easily merge vendor information from one "source" vendor into another "target" vendor, and permanently remove the source vendor from your database. Merged data includes all aging and history records.

Accounts Receivable Enhancements

Customer Merge

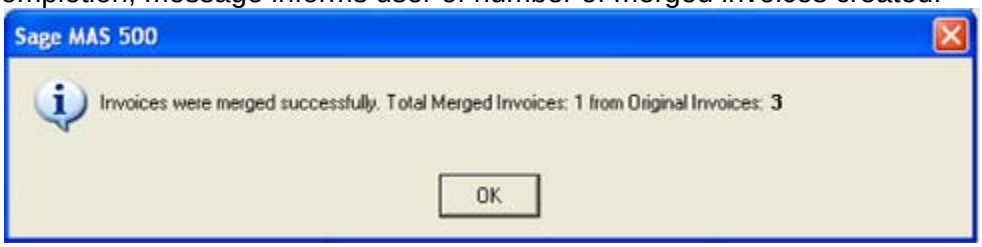
This feature enables you to merge customer information from one "source" customer into another "target" customer, and permanently remove the source customer from your database. Merged data includes all aging and history records.

Invoice Merge

Multiple shipments can be merged into a single invoice. A new AR security event allows you to control which users have access to this function. The following conditions must be met:

- All line items must originate from same sales order
- Transactions must be “invoice” (not credit memos)
- Must all be same currency
- Invoice cannot have a down payment

Upon completion, message informs user of number of merged invoices created.



Credit Card Refunds

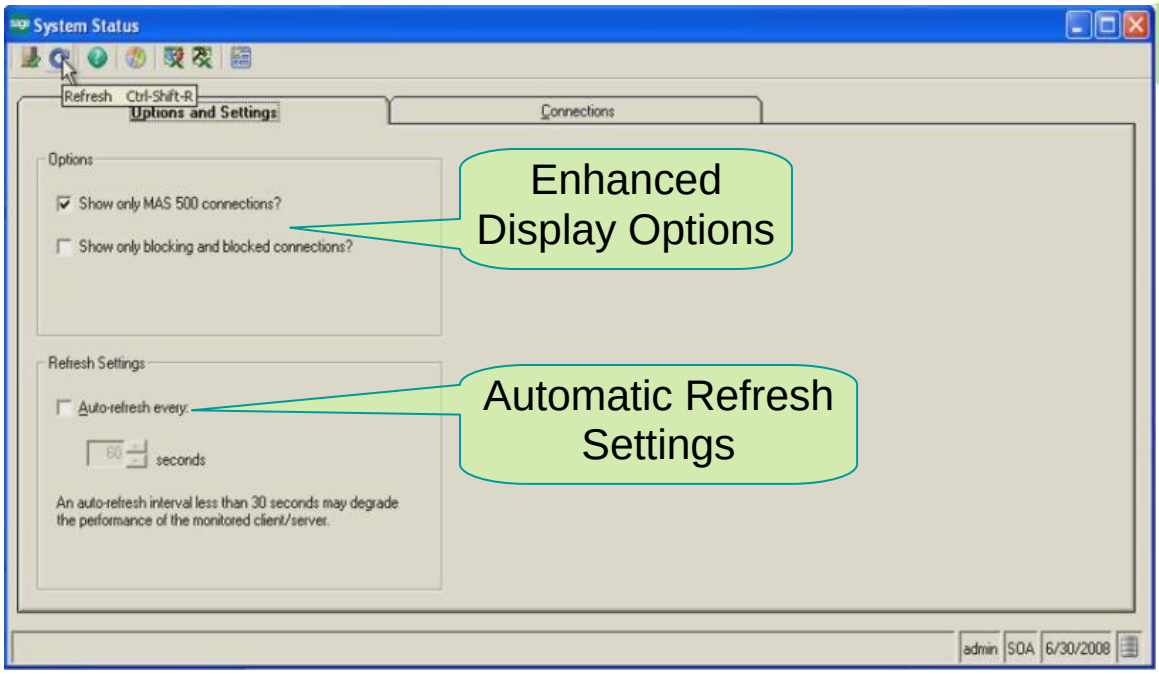
Refunds for credit card payments can conveniently be issued in the Process Cash Receipts and Process Invoices tasks.

System Manager Enhancements

Enhanced System Status

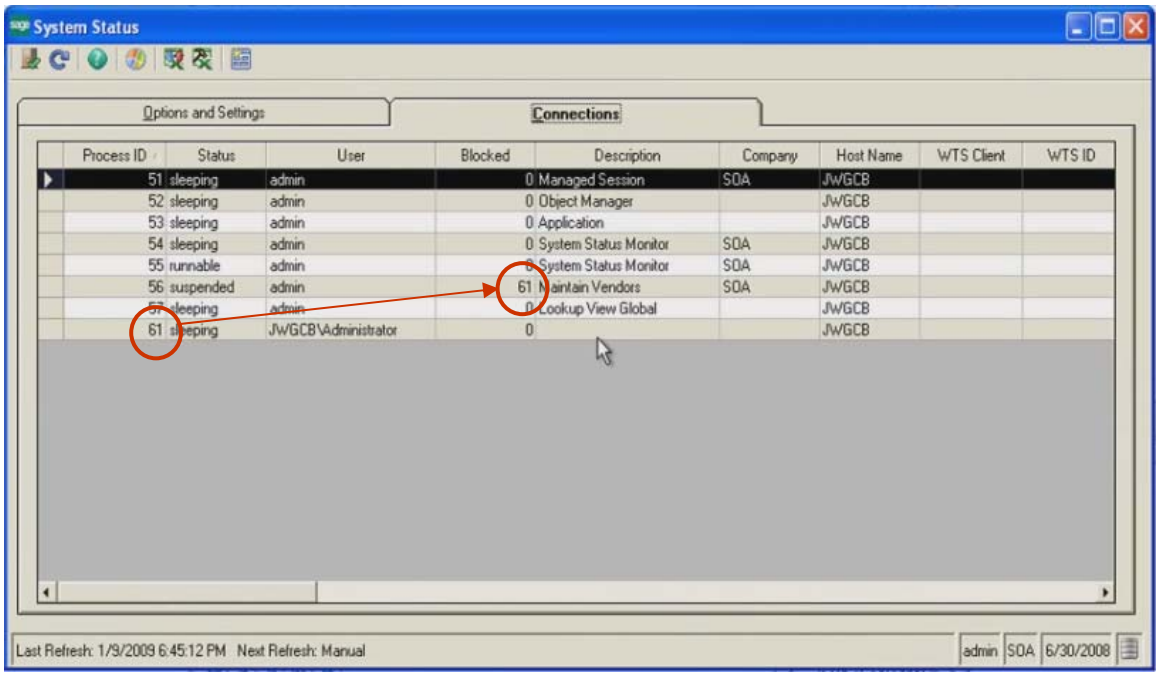
The System Status screen is a valuable tool for larger systems by providing enhanced system performance monitoring and allowing you to analyze Sage MAS 500 connections to help quickly identify and resolve any locking or blocking issues. A new Setting Options window allows you to:

- View and hide other SQL Server connections outside of Sage MAS 500
- Set automatic refresh interval
- Initiate on-demand refresh



Additionally, extended session detail information includes:

- Blocked indicators (showing blocking session ID and wait time)
- Terminal services session information ("piggyback" connection and see what the user is seeing)
- Session Command and Application Context provide information on what the user was doing when the lock occurred



New Security Events

With Sage MAS 500, you control which users have the authority to execute certain tasks and functions. New security events were added for the Sales Order, Inventory Management, Purchase Order, and Credit Card Processing modules.

Below is a list of new security events.

Module	New Security Event
Accounts Receivable	Merge Invoices
Credit Card	Bypass Address Verification
Credit Card	Bypass Security Code Verification
Credit Card	Modify read-only processor account additional parameters
Credit Card	View secured processor account additional parameters
Inventory Management	Delete frozen qty cards during Physical Count Entry
Inventory Management	Set Uncounted to Zero during Physical Count Entry
Accounts Payable	Allow multiple copies of a check
Purchase Order	Delete Purchase Order
Sales Order	Delete Sales Order
Sales Order	Delete Invoice
Sales Order	Generate Invoice
Sales Order	View Invoice Total

For example, if you open a data entry task in Sales Order or Purchase Order and attempt to delete an existing order, the system checks your security setup to verify that you have the appropriate permissions to delete the order. If you do not have the appropriate security setup, a message dialog box appears that allows you to override the security event.

Source Code Additions in v7.3 SDK

Source code for the following PSG xAPIs is included in the 7.3 Software Development Kit (SDK):

- Import AR Pending Cash Receipts xAPI
- Import Inventory Transactions xAPI
- LockBox (import and post receipts from a bank file)

Performance and Scalability Enhancements*

* Performance results in this section are based on Sage internal testing. Individual performance may vary. Since many factors impact system performance, Sage does not guarantee that each customer will experience the same results.

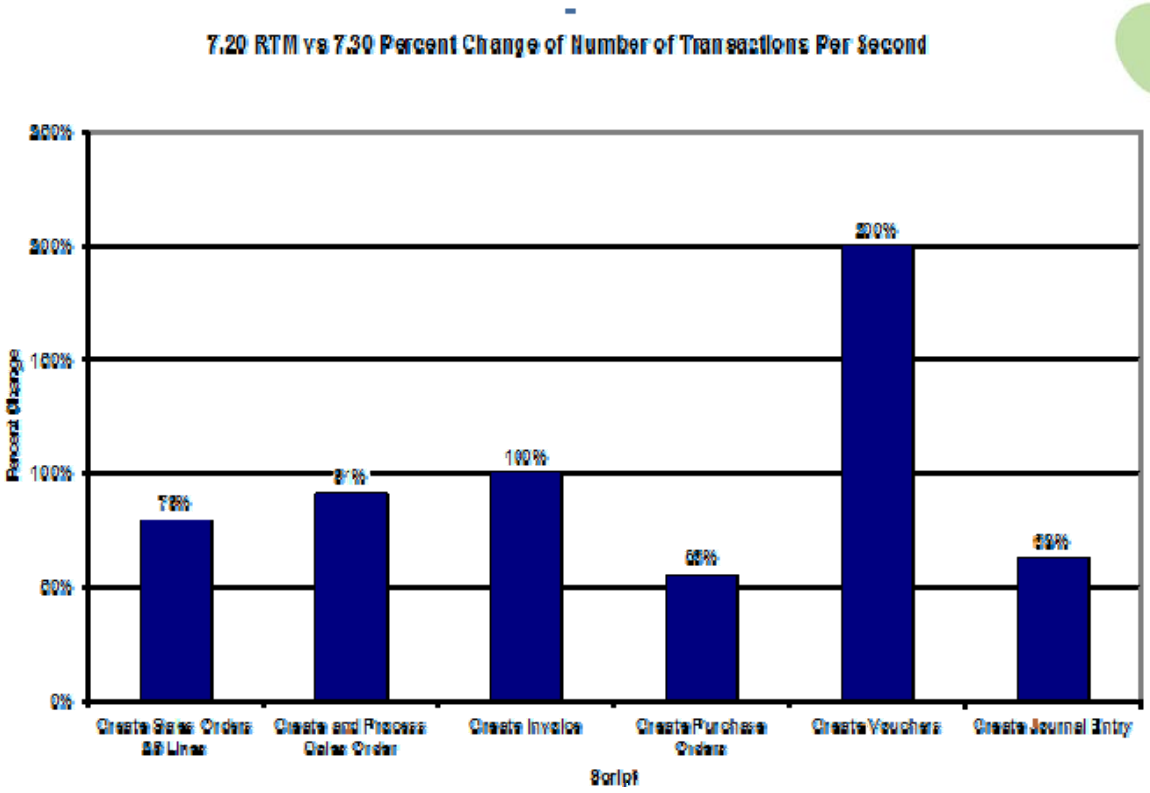
Scalability Improvements

Scalability in version 7.3 has been improved to support up to 70% more concurrent users than version 7.2, while maintaining comparable response times.

System Wide Performance Improvements

System performance in version 7.3 has been improved significantly in numerous areas. Compared to the initial release of version 7.2:

- **Create and Process Sales Order** can process 90% more transactions per second
- **Create Invoice** task can process 100% more transactions per second
- **Create Purchase Order** task can process 50% more transactions per second
- **Create Vouchers** task can process 200% more transactions per second
- **Create Journal Entry** can process 60% more transactions per second
- **Cash Receipts Entry** load & process is up to 99% faster on large loads
- **Save Edited Shipment** is approximately 50% faster
- **Enter Sales Order and Print Invoice** is approximately 75% faster
- **Sales Order Shipment Commit** is approximately 70% faster
- **Sales Order Shipment Validation** is approximately 50% faster
- **Manufacturing Work Order Posting** is up to 95% faster on large postings



Additional details on Sales Order Commit and Sales Order Validation are shown below using different tracking methods.

Sales Order Commit

Tracking Method	Performance Improvements
Average	54% faster
Standard	70% faster
Lot	73% faster
Actual	70% faster

Sales Order Validation

Tracking Method	Performance Improvements
Average	54% faster
Standard	58% faster
Lot	58% faster
Actual	44% faster

Crystal Reports Performance

The Report Update Utility has been created to improve the performance of Crystal Reports by eliminating redundant validations caused by metadata inconsistencies.

Manufacturing Production Entry and Labor Entry

Performance has been significantly improved in the manufacturing Production Entry and Labor Entry tasks. By eliminating concurrency issues, performance on these tasks has improved approximately 90%.

Operational Area	Performance Improvements
Work Order Posting	95% faster on large posting
Labor Transaction Posting	89% faster on large posting

Sage Software Solutions

Sage SalesLogix ERP Link 3.0

Sage SalesLogix ERP Link 3.0 for Sage MAS 500 will continue to be supported in version 7.3. This link changes the way you do business by providing access to the most current product information, pricing, discounts, and inventory status when creating quotes or taking orders in Sage SalesLogix. In addition, without having to leave Sage SalesLogix, you can view all relevant Sage MAS 500 customer data such as credit status, terms, and account balance so your sales personnel can deliver first class customer service.

Version compatibility:

	Sage SalesLogix Version	
Sage MAS 500 Version	**7.22**	**7.5**
Sage MAS 500 v7.3	Yes	Yes
Sage MAS 500 v7.2 (Dec 2008 MU or later)	Yes	Yes

Sage Abra HRMS v8.5

For over 25 years Sage Abra has been a leader in affordable and trusted HR and Payroll software solutions. A major enhancement in version 8.5 is the ability for employees to view and access payroll data and pay history in Abra Workforce Connections (AWC) Employee Self Service. For additional details, please contact your authorized Sage Abra Business Partner.

Sage FAS 500 v2009.1.1

The award winning Sage FAS 500 fixed asset management solution for 2009 includes the Assets Snapshot dashboard, updated tax law compliance, support for Crystal Reports 11, and changes from the American Recovery and Reinvestment Act of 2009. For details, see http://www.sagefas.com/imageserver/portal_managed_assets/sagefas/PDFs/FAS200911_Whats_New.pdf.

Sage TimeSheet v9.8

Sage TimeSheet v9.8 for remote Time and Expense entry and project management provides an integrated MAS 500 solution for professional service organizations that need to track and bill projects based on a fixed or time and material basis.

New features delivered in version 9.8 include:

- Simplified time entry including:
  - Easy identification of the task the user is about to enter in TimeSheet view
  - Ability to resize each component in the task window individually
  - Ability to add time (such as holidays) to all employees at once
  - New configuration option in the TimeCard view so modifications of the start time will not impact the end time
  - Improved data validation of fields
- Time Saving Features
  - Mark as complete feature enabled in core product allowing everyone to quickly close completed tasks
  - New print button for reports
- Support for Microsoft Windows Server 2008 & SQL Server 2008

Third Party Considerations

Crystal Reports v10.0

Crystal Reports provides access to your data and allows you to format it, and deliver it as information inside and outside your organization. There will be no changes to Crystal Reports with this release.

Microsoft FRx v6.7 SP 10

FRx is a financial reporting application that gives midsize organizations and corporate businesses control of their entire financial reporting process across one or more legal entities. There will be no changes to FRx with this release.

NOTE: Microsoft will allow distribution of FRx and related extensions through **December 2011**, and will continue to support FRx through **December 2012**.

StarShip Parcel 9.9.7

StarShip Parcel integrates tightly with Sage MAS 500 and makes the entire shipment management process more fluid. Plus, when combined with the pick, pack, and ship feature built into the Sales Order module, StarShip Parcel helps your company become a more competitive distributor and even offers features that can potentially reduce your shipping and shipping-related expenses.

StarShip Freight 10.0.3

StarShip Freight makes shipping items on pallets in a truckload (TL) and less-than-truckload (LTL) more efficient and cost effective.

Technology Features

Data Migration

Data Migrator version 7.3 will support migrations from Sage MAS 90 and 200 v4.1.

Platform Support Overview

The following are general platform support guidelines for this release. Complete details will be published in late October in the Sage MAS 500 v7.3 Compatibility and Resource Guide.

Microsoft SQL Server 2008 and 2005: Full SQL Server 2008 and 2005 support for Sage MAS 500 databases. For complete details about the updates and changes available in SQL Server 2008 please visit http://www.microsoft.com/sqlserver/2008/en/us/whats-new.aspx.

Accounting Server OS: Microsoft Windows Server 2008 and Windows 2003 Server.

Microsoft Visual Studio 2008: Sage MAS 500 utilizes the new .NET Framework 3.5 development toolset. Application benefits include increased performance and throughput in the Desktop, Business Insights Explorer, and Business Insights Analyzer areas.

Virtualization / Thin Client:

Microsoft: Windows 2008 Hyper-V, Windows 2008 Terminal Server, Windows 2008 RemoteApp, Windows 2003 Terminal Server

Citrix: XenServer 5.0, XenApp 4.5

VMWare: VMWare Server ESXi 3.5, VMWare Workstation 6.0

Accounting Client OS: Windows Vista SP1, and Windows XP SP3.

Web Server OS: Microsoft Windows Server 2008 IIS 7.0, and Windows 2003 Server and IIS 6.0.

Browser: Microsoft Internet Explorer 7.0 and 6.0.

Microsoft Office: Office XP, Office 2003 and Office 2007.

Platform Retirements

The following platforms will not be supported in v7.3:

- SQL Server 2000
- Windows 2000 server and client

Recommended System Requirements

Sage MAS 500 Edition	Server	Client
Small Business Edition	Single Pentium Xeon or better 1 GB RAM 2 GB disk space	Pentium IV or better 1 GB RAM
Standard Edition	Dual Pentium Xeon or better 2-4 GB RAM 4 GB disk space	
Enterprise Edition	Dual Pentium Xeon or better (Quad capable) 4-8 GB RAM 10 GB disk space	

Version Retirements

Versions 6.3 and 7.0 were previously scheduled to be retired by the end of 2009, but due to economic conditions and customer feedback, Sage will extend support for these versions to allow customers additional time to plan and budget for the upgrade to a current version of Sage MAS 500.

Support for versions 6.3 and 7.0 will be retired during 2010. The retirement date is being finalized, and will be announced shortly.

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